Avatar Process Improvement meeting notes for 2/14/20

Last edited: Just now

Attendance

Remotely: Grace Sladivar-Napoles, Michael Garcia, Gian Wong, Chris McCauley, Sarah Tisdale
In Person: David Chicoine, Barbara Lehman, Bill McCabe, Maya Jarrow, Adriana Bare

Updates

- NOABD: Kick off with QI team on 2/12/20, who is meeting and looking at all details on Wed 2/19 and will report back briefly on 2/21/20, if there's time

- Progress Note Aging Reports :
    - Summary Report- changed the ranges according to plan 1-7,8-10 and 11+ days.
    - Changed date math in the Progress not Aging Report to final date - service date +1 - The request to add % totals in the report footer compromised performance and it was left out. Michael optimized the query to maximize compiling speed, and improve performance.
- SRDL form launch: something wrong happened when moving the form to LiVE as planned so, it still is only in UAT.
    - For your convenience, here's a link to UAT: https://santacruzuat.netsmartcloud.com/radplus/index.jsp
    - Email AskQI@santacruzcounty.us if you need your password reset. Goal is to confirm the event logic is accurate. Event logic is the relationship that controls what becomes required or disabled based on selections in one field to others.
    - Group wants to confirm the timeline/plan to roll out new forms:
        - 1) announce with info notice to all,
        - 2) Do general training, (confirm key stakeholders experienced training for both new form and accompanying reports - and supervisors are on board) (for the SRDL, key stakeholders are Access including Fee Clerks, MERT and MH Liasons)
        - 3) cue Supervisors, so they check in with staff to make sure they are ready to go live, and use UAT to refresh staff training right before Go-Live
        - 4) confirm go-live date,
        - 5) go LIVE announcement

- 6) Move form into LIVE environment at end of day or weekend - not to disrupt workflow in the middle of day or use of form.

Client Alerts

---

1) Need education campaign on how Alerts apply to staff and how to make it meanigful for them, as well as roll out training on the client alert form itself
2) Informational messages - ensure the alerts are displayed least amount of times, and targeted to specific activities. i.e. "parent speak spanish" - likely to relate to scheduling activities, so we need to make sure only those forms are selected - not all
3) Develop target forms to select based on Alert Categories:

- Security = all forms

- Scheduling (language requirements, special procedures how to schedule services) = TBD

- Missing Demographic, or financial info = TBD
- Name and/or Gender preferences = TBD

4) Gian will ask Netsmart for documentation on which forms trigger the displays of alerts when they are selected under "Applicable Forms" field

(side question) Work flow alerts: how are they controlled and can the active pop up window when something is added, no longer come up and depend on staff working through their to-do items with prompting? We've asked before and the answer was no. We will ask Netsmart again.

Next week

- ANSA (CANS) form changes, including what items should be brought forward in updates- which will impact both adult and kid forms.
- Brief update NOABD - if possible